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ABSTRACT

This paper discusses the planning processes and plans of school principals in Israel. It describes how educational planning processes often expose educators to a dilemma: public expectations pressure principals to create quick solutions for complicated educational issues, whereas their professional obligation is to produce plans that will address the complexity of these issues in an adequate and effective manner. To examine this dilemma, 163 Israeli school principals in 4 different districts were asked to define time perspectives for planning processes and plans related to 4 central policy issues in the Israeli educational agenda. The principals were also asked to prioritize future planning. The study was conducted shortly after a large influx of Ethiopian and Russian immigrants. The results indicate that the principals believed that the four issues were highly complex. However, principals tended to simplify the complexity of issues when the urgency related to these issues is high. Public education was characterized by mixed-typed situations that presented dilemmas for educators. These dilemmas exposed educators to a contradiction between their desire to meet social and political interests and their professional duty to perform planning processes that enable them to address properly the complexity of educational issues. (Contains 30 references, 3 tables, and 1 figure.) (RJM)

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THE SIMPLIFICATION TRAP IN EDUCATIONAL PLANNING

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THE SIMPLIFICATION TRAP IN EDUCATIONAL PLANNING

ABSTRACT. Educational planning processes often expose educators to a dilemma of their desire, on one hand, to meet public expectations by creating quick solutions for complicated educational issues and, on the other, their professional obligation to produce plans which will address adequately and effectively the complexity of these issues. One hundred sixty three Israeli school principals were asked to define time perspectives to planning processes and plans related to four central policy issues in the Israeli educational agenda. Based on the results obtained it is possible to conclude that school principals tend to simplify the complexity of issues when the urgency related to these issues is high. A conceptual model presenting different dilemma-type situations is offered and some of the implications are further discussed.

THEORETICAL FRAMEWORK

In what way are school principals' professional behaviors affected by the urgency and complexity related to educational issues? Using long-term perspectives as indicators for the magnitude of managerial activities, this study offers some answers to this question as it explores the perspectives of planning processes and plans defined by school principals for four complex educational issues that form the Israeli educational agenda.

The educational sector introduces educators to a dilemma and intense stress. The dilemma emerges from two distinct characteristics of the educational domain - *complexity* and *urgency*. These may contradict each other in certain circumstances if educators intend to produce plans which rely on both - the inherent complexity of educational issues and the social expectations often related to them.

Complexity: The complexity of education is derived from the ambiguity characterizing this field, the variety of interests involved and the turbulent environment in which schools operate. Complexity is a quality of educational objectives characterized not by their definition but by their lack of it. Educational goals are systematically ambiguous (Wildavsky, 1979), the relation between ends and means tends to be vague (Rose, 1984) and the measures for their achievement are inherently unreliable (March & Olsen, 1976; Pressman & Wildavsky, 1984; Hogwood & Peters, 1985). Therefore, it is often hard to measure and evaluate outcomes. Complexity also characterizes social and political interests that schools are expected to satisfy. Schools are exposed to a variety of contradicting interests which exist in the turbulent environment in which they operate (Drucker, 1980) and need to be flexible so as to enable their adaptation when conditions or circumstances change (Lane, 1995:168). As a result, public schools experience deep

tension between the need for stability and the need for flexibility, since in their stability society finds its order, and yet that order depends upon their capacity to change (Stewart & Ranson, 1994:63).

The complexity of the educational system is aggravated by the inherent essence and nature of its issues and problems (Elboim-Dror, 1970). Educational problems are ill structured and it is difficult to differentiate between problems and their symptoms (Kaufman, 1972). Using Rittel & Webber's classification, educational issues are "wicked" rather than "tame": they are ill defined; there is no ultimate test for their solutions; they are unique; they are symptoms of other issues and educators are held liable for any consequences obtained by their actions, since the social tolerance for undesired outcomes and mistakes is low when wicked issues are involved (1973). Therefore, the analysis of wicked and complex educational issues requires more time in comparison to simple and less sophisticated issues. A direct connection should exist between the complexity of issues and the time used to address them: the larger the complexity, the longer the perspectives of time (Unesco, 1982). In this sense, it may be argued that complexity inhibits short-term processes (O'Toole, 1989) and that the planning processes of highly complex educational issues will have to progress from short-term to more long-term planning (Heiss, 1990:254).

***Urgency*:** As social institutions, public schools are expected to confront issues, often characterized by urgency. Schools aim their activities towards the satisfaction of various interests which formulate the educational agenda. However, agendas are limited by calendars, politics and the time and attention of policy-makers and they change over time (O'Toole, 1989). Since interests shift rapidly and have a short life span in the educational agenda, any attempt performed by educators to present some achievement is

likely to be characterized by a sense of urgency. This sense of urgency may create a tendency towards irrationality in the processes of planning (Hogwood & Peters, 1985) and indicates that rational decision-making and planning are hardly feasible in public schools, but rather processes which are based on bounded rationality (Simon, 1947; Lindblom, 1959). Therefore, in the processes of educational planning, incrementalism is emphasized (Wildavsky, 1984) and risk is handled by holding onto past or fundamental commitments (Braybrooke & Lindblom, 1963). The difficulty to plan educational issues rationally and coherently (Cleary & Henry, 1989:2) and the fact that educational problems are not givens but rather the subjective determinations of participants in the policy process are likely to reinforce educators' use of a "muddling through" strategy as a basic mode of operation (Lindblom, 1962:13).

Moreover, these circumstances may encourage the adoption of quick rather than comprehensive solutions for educational problems, in order to maximize the scores on indicators of today's performance (Kanter & Summers, 1994:224). These preferences are likely to influence educators to favor tactical and short-term rather than strategic and long-term solutions for "hot" and complex educational issues which are not likely to address effectively the issues' inherent complexity.

Although complicated, it is suggested that strategic and long-term plans are required if comprehensive and effective solutions for complex problems are to be produced (Das, 1991). This may be explained since strategic and long-term planning processes enable to better analyze and understand the issues at hand within the frame of a wider context and therefore, increase the compatibility of solutions to problems. Such processes emphasize the consideration of a manageable number of future alternatives (Quade, 1982:112) and

the adaptation of organizational resources to the environment in a way that permits efficient achievement of the organization's goals (Paine & Anderson, 1983:6).

Therefore, strategic and long-term planning becomes a critical conceptual skill (Luke, 1992:26) if plans are expected to adequately meet the inherent nature of educational issues and confront successfully the clashing demands which they face by political, economic and social forces (Graham & Hays, 1986:37).

Although strategic and long-term planning provides the means to address complexity more effectively, such processes take more time in comparison to tactical and short-term processes. Therefore, educators are most likely to experience stress if intend to perform long-range processes when facing issues that are both complex and urgent.

This study explores the planning and plans' perspectives defined by school principals for four wicked and complex educational issues which formulate the Israeli educational agenda. It is assumed that short-term perspectives for planning processes and plans defined by school principals for any of the issues studied may indicate a tendency to respond to the issues' urgency rather than to the issues complexity.

METHOD

Questionnaires were administered among 163 Israeli school principals in four different districts. The questionnaires explore the perceived complexity and urgency and the long-term perspectives defined by school principals for planning processes and plans for four central policy issues that form the Israeli educational agenda: the absorption of immigrant children by the educational system, school autonomy, the introduction of computers into schools and parental choice. It is important to note that the study took place just after the large influx of Ethiopian and Russian immigrants to Israel.

The sense of complexity and urgency related to these issues is measured using a five-point scale where 5 stands for "extremely complicated/urgent and 1 stands for "not complicated/urgent at all".

In addition, for each of the issues studied, respondents were asked to fill a number which most represents the future perspective toward which planning processes and plans should be directed. For example:

"A plan intending to fully absorb immigrant children by the educational system should not last longer than _____ days _____ weeks _____ months _____ years".

The same item pattern is used by Gagne (1979), who studied teachers' future time perspectives for students and curricula, and by Timser (1985), who studied personal and global future orientation.

The analysis of the data is performed using two statistical procedures. An analysis of variance is initially performed to draw inferences about differences among the perspectives of the four issues studied. This analysis is followed by a Scheffe Contrasts procedure, which is used to determine the source for these differences. This procedure is employed since it allows a simultaneous comparison among four means while the significance level remains $\alpha = .05$.

RESULTS

A preliminary assessment of school principals' sense of complexity and urgency related to the four issues studied reveals that all the issues studied are perceived by school principals as highly complex (means range between 4.5 and 4.9).

Moreover, the absorption of immigrant children by the educational system is considered as "very urgent" and the most urgent among the issues studied, as Table 1 indicates.

Insert Table 1 about here

An analysis of variance procedure used to distinguish among the perspectives defined for long-term planning processes of the four issues studied indicate that there exist significant differences among the perspectives ($p<.0001$).

Insert Table 2 about here

A Scheffe Contrasts procedure used to determine what is the source for these differences points at the perspective defined by school principals for planning the absorption of immigrant children by the educational system as the only statistically significant source for differences: while the planning perspective defined for this issue is 243 days, the perspectives defined for planning school autonomy, the introduction of computers into schools and parental choice are 641 days, 572 days and 719 days respectively.

Similar results are obtained when analyzing plans' perspectives defined by school principals for the four issues studied.

Insert Table 3 about here

A Scheffe Contrasts procedure used to determine what is the source for the differences points at the perspectives defined for a plan intended to fully absorb immigrant children by the educational system as the only source for differences.

The plan's perspective defined for this issue is 678 days, while plans' perspectives defined for the introduction of computers into schools, for school autonomy and for parental choice are 1302 days, 1414 days and 1659 days respectively.

These results indicate that the perspectives defined by school principals for the four issues studied are relatively short, as they range on average between 8 and 17 months for the planning processes and between 20 to 53 months for the implementation of plans. Moreover, the results point out the distinctiveness of the planning and plans' perspectives defined by school principals for the absorption of immigrant children by the educational system. These perspectives are short in absolute numbers and the shortest in comparison to the other issues studied. This is rather surprising considering the inherent complexity of this issue.

DISCUSSION

The need of educators to confront the complexity and the urgency which characterizes educational issues reflects the dilemma inherent in the educational domain. Such circumstances are likely to create stress for educators and expose them to a discrepancy between the time needed to effectively address educational issues and the time they actually have.

These dilemma may be illustrated using the following conceptual model which presents the various situations created for educators involved in planning processes, as a result of the complexity and the urgency attributed to issues and problems.

Insert Figure 1 about here

Each of the four squares of the model reflects different type of interaction between the complexity and urgency characterizing the issues to be planned. The upper triangle in each of the squares refers to the complexity attributed to the issues while the lower triangle refers to the urgency. "Strategic" and "tactical" refer to the scope of analysis and to the time perspectives which planners are likely to employ when planning a particular issue. High complexity is likely to motivate educators' use of strategic, long-term and comprehensive planning processes, while low complexity is likely to motivate them to decrease the span of planning processes and employ tactical perspectives to the plans which they produce.

On the other hand, a high degree of urgency is likely to motivate educators to limit their planning processes and plans to the near future while a low degree of urgency allows them to direct these processes toward longer perspectives in future time.

The situations presented in the model may be divided into two groups: 'pure-type' situations (cells 3 and 4) and 'mixed-type' situations (cells 1 and 2).

Pure-Type Situations: In pure-type situations, a direct connection exists between the complexity and the urgency related to issues. For example in cell number 3, educators are likely to use tactical planning processes since the low complexity and the high urgency both imply short-term, immediate and narrow solutions for this type of circumstances.

Cell number 4 presents another pure-type situation although different in nature. The high degree of complexity which characterizes this situation requires the performance of strategic and long-term planning processes, while the low urgency permits using strategic processes directed toward long-term perspectives in future time.

In pure-type situations, educators hardly ever experience a contradiction between the complexity and the urgency attributed to specific issues, since the urgency in terms of the time span allows the production of plans which correspond with the issues' actual contents, components and inherent complexity.

Mixed-Type Situations: Contrary to pure-type situations, mixed-type situations are likely to create dilemmas and stress for educators. These dilemmas are a result of the existing contradiction between the complexity and the urgency attributed to situations of this type, which have an opposite influence on the scope of analysis and the time perspective which educators may employ in these circumstances.

Mixed-type situations inhibit educators from creating plans which adequately address the complexity of issues and therefore may be considered as a significant source of stress and tension for them. Stress is likely to be strong, especially when the urgency characterizing issues inhibit educators from adequately addressing the issues' complexity and provide plans which offer significant and worthwhile solutions for these issues. Situation of this type is evident in cell number 2.

Stress is considered to be a destructive and undesirable feature of organizational work processes and it is therefore likely that educators will try to avoid it. In circumstances where stress cannot be avoided or ignored, efforts may be put into creating solutions which will temporarily decrease it even if these solutions will eventually reduce the effectiveness of the organizational work processes.

One of the possible ways to control stress is by changing the way the situations are perceived (Wallace, 1992). Since urgency is determined by forces which are beyond educators' control, this can be done only if they reconceptualize their perceptions of

complexity attributed to specific issues so that the circumstances will appear to have a pure nature rather than mixed.

A simple although misleading solution for a low-complexity low-urgency situation can be created if educators reconceptualize the complexity and consider it as higher than it actually is. If they do so, they are likely to perform strategic and long-term planning processes which correspond with the low urgency that characterizes this situation (as indicated by arrow A). This process is likely to produce more comprehensive planning processes and provide strategic plans which are hardly needed for issues characterized by low complexity.

This type of solution may serve as an example for Parkinson's Law which states that "the work will expand so as to fill the time available for its completion" (Parkinson, 1957:2). Such a solution is likely to damage the organizational effectiveness since a lot of energy will be wasted while invested in redundant planning processes and organizational activities. However, it is important to note that educators will hardly ever experience this kind of mixed-type situation, since the inherent complexity of most educational issues is high.

The second mixed-type situation is a high-complexity high-urgency situation.

High complexity requires the performance of strategic, comprehensive and long-term planning processes, while high urgency calls for quicker, short-term and tactical solutions. There is no doubt that this type of mixed situation creates stress and heavy tensions for educators who are limited in their ability to perform the planning processes in accordance with the complexity inherent in the issues at hand.

While searching for a solution that will reduce their stress, educators exposed to this kind of mixed-type situation might be tempted to reconceptualize their perceptions of

complexity and consider the issues as if they were less complicated than they actually are. This process will promote the use of short-term rather than long-term planning perspectives and the implementation of short-term plans which limit the ability to address high levels of complexity.

This process in which educators involved in planning artificially diminish the complexity attributed to issues may be termed "simplification," since they address complicated issues as if they are rather simple, just in order to satisfy interests and expectations for quick though partial solutions and have their own tensions temporarily reduced.

These two presented mixed-type situations differ in the type of stress which they create: in the second mixed-type situation presented, educators experience insufficient time when planning highly complex issues while in the first mixed-type situation, they have more time than is actually needed for planning and implementing plans related to the issues at hand.

Based on the findings obtained and on the complexity and urgency of the educational issues studied, it is possible to conclude that the school principals studied put much emphasize on the issues' urgency when asked to define the perspectives for planning processes and plans. The perspectives which they defined for the absorption of immigrant children by the educational system may serve as an example for a simplification process which they are likely to perform.

Based on the circumstances created in mixed-type situations, it might be argued that the urgency attributed to an educational issue or problem have a critical influence on the solutions which educators are likely to offer for it. The higher the urgency which is attributed to a specific issue - the lower the probability that educators will adequately address its complexity and create plans which offer satisfactory and long lasting

solutions for it. These circumstances are paradoxical since complicated and urgent issues such as the absorption of immigrant children by the Israeli educational system, are more likely to be addressed by educators using tactical rather than strategic procedures, which are hardly sufficient if plans are intended to cope effectively with the complexity of these issues.

In summary, public education is characterized, among other ways, by mixed-typed situations which present dilemmas for educators. These dilemmas expose educators to a contradiction between their desire to meet social and political interests and their professional duty to perform planning processes which enable them to address the complexity of educational issues adequately and effectively. This means that the quality and effectiveness of any planning process performed in mixed-type circumstances depends to a great extent on the way educators address these dilemmas and the type of solutions which they employ for them.

Educators should place themselves in a position that will enable them to adequately address educational issues in spite of their own tensions.

A huge temptation is inherent in the processes of reconceptualizing the circumstances when experiencing stress, and this process may serve as one of the possible alternatives to choose from. However, the decision to use it must be based on a careful consideration of the long-term consequences that this type of solution might produce in comparison to the other choices for action.

Although the ability of educators to perform rational planning processes is bounded, they are still responsible to make the right choices so that children will benefit most. This responsibility should direct their mode of operation and be a main guideline while planning in the service of schools.

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Table 1. The perceived urgency related to the issues studied

Issue	*M*	sd
Absorption of immigrant children	4.4	.32
Introduction of computers into schools	2.3	.53
school autonomy	1.9	.33
parental choice	1.2	.28

N=163

Table 2: The perspectives of planning processes

Source	SS	*d.f*	MS	F (3, 623)	p
Between	20516424.7	3	6838808.25	30.9209	.0000
Within	137789414.0	623	221170.80		
Total	158305838.7	626			

n=163

Table 3: The perspectives of plans.

Source	SS	*d.f.*	MS	F (3, 618)	p
Between	94711890.3	3	31570630.1	7.0359	.0001
Within	2773023223	618	4487092.5		
Total	2867735114	621			

n=163

FIGURE 1: THE IMPLICATIONS OF URGENCY AND COMPLEXITY FOR THE EDUCATIONAL PLANNING PROCESSES AND PLANS